



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Business and Income Taxes Division Management Analyst

Job Code Title

Management Analyst

Pay Band

07

Job Code Number

131817

Business and Income Taxes Division**Fair Labor Standards Act**

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Business and Income Taxes Division is responsible for the administration, auditing, compliance, and collection activities for approximately 30 tax types and the appraisal and assessment of industrial and centrally assessed property. Tax types include corporation income, individual income, withholding, combined oil and gas, coal severance, other natural resource taxes, cigarette, retail telecommunications, lodging facilities, and miscellaneous taxes. The division includes the Administrative Team, Business Tax and Valuation Bureau (BTV), and the Income and Withholding Tax Bureau (IWT).

Job Responsibilities

The Management Analyst provides leadership and direction for division research; analysis; and program and policy development projects. The incumbent is the primary point of contact with internal and external customers and provides technical assistance related to division program or project areas. The position reports to the division administrator or bureau chief.

• Project Management and Analysis 75%

1. Plans, directs, and coordinates changes in operational and programmatic direction, policies, guidelines, procedures and initiatives to meet deadlines and process measures and goals. Identifies division resource needs and recommends adjustments to resource allocations.
2. Analyzes the operation of program functions and recommends operational policies and long-range strategic goals and objectives for division programs. Works with the administrator and bureau chiefs to design and implement organizational and operational changes. Advises division leadership regarding policy and procedures to improve efficiency.
3. Develops, implements, and monitors program performance measures to ensure the efficiency and effectiveness of program operations. Develops quality assurance programs. Ensures the quality of work and conformance to industry and agency standards.
4. Evaluates the effectiveness of division program activities and policies. Recommends and implements program modifications or realignments to realize division goals. Develops and implements revenue collection and tax assessment methods. Benchmarks accomplishments against other state and national projects.

5. Develops, prepares, and presents project updates to department leadership as a member of the management team. Updates include schedules, costs and briefings on sensitive issues. Develops and implements project tracking systems to assist the administrator and/or bureau chief in meeting operational deadlines and process measures and goals.
6. Conducts research and analyzes the impacts of comprehensive tax proposals and legislation based on the relationships between guiding principles of taxation and strategic revenue policies. Assesses fiscal impacts and develops fiscal notes detailing the administrative costs of proposed legislation. Researches and provides direction to department leadership and legal staff on the impact of proposed legislation on applicable federal or state statutes, administrative rules, and state and department policies and procedures.
7. Identifies division resource needs and recommends adjustments in resource allocations for administrator approval. Works in conjunction with the administrator, managers, and other management analysts to implement division resource allocation changes.
8. Assists management in planning, developing, and implementing program strategies that set the overall direction of division programs and establish program goals and objectives. Conducts research and analysis. Confers with department staff and other state and federal officials. Develops recommendations based on best practices and statutory requirements. Provides technical and strategic expertise on legislative issues, policies, procedures, guidelines, laws, and practices. Searches and uses Montana Codes Annotated (MCA) and the Administrative Rules of Montana (ARM) and works with legal staff to interpret laws, rules, and procedural requirements.
9. Coordinates the maintenance, enhancement, and development of division computer applications with program managers and information technology staff. Applications include data processing, manipulation, conversion and analysis. Develops advanced management analysis tools and applications including applications for multiple regression analysis, lookup tables, advanced charting techniques, data filters, pivot tables, etc.
10. Establishes and oversees the maintenance of division documentation, recordkeeping systems, and information systems. Coordinates the development of electronic and paper data transfer, storage, and retrieval systems. Ensures that project recordkeeping complies with regulations and professional standards. Coordinates the development of program databases and related technology for the secure dissemination and transfer of information.
11. Develops income tax manuals, schedules, and procedures using input from work group members and review meetings to make them easier for taxpayers and staff to use. Responds to inquiries from division staff. Provides professional and technical assistance regarding the development and use of division manuals, schedules, and guidebooks.

- **Communication and Technical Assistance 20%**

1. Evaluates comments, complaints, and requests from internal and external stakeholders on a range of issues associated with collection, enforcement, and program policies. Works with department leadership to determine the significance of requests and appropriate responses. May delegate responses to project staff.
2. As a member of the division's management team, provides professional consultation and technical expertise on division-wide planning, budgeting, resource allocation, goals and objectives, program functions and operations, and issues that affect division operations and activities.
3. Testifies before legislative committees, administrative rule hearings, and interim committees on a variety of tax-related issues and provides program and project papers. Works with department leadership and legal staff to determine the depth and scope of testimony.
4. Analyzes program effectiveness, new standards, specifications, technologies, policies, and staff performance. Researches, evaluates, designs, and presents training to staff and coordinates preparation of training manuals and materials.
5. Provides information in a variety of formats such as press releases, brochures, web updates, and other information.

6. Researches background information and prepares drafts of directives and memos to address taxpayers concerns and questions for signature by unit managers, bureau chiefs, division administrator, or the director.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the supervisor.

Job Requirements

To perform successfully as a management analyst, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that incumbent has deductive and inductive reasoning abilities to solve complex problems. Incumbent is required to make decisions based on the relative costs and benefits of potential actions. Skills in conducting needs assessments; developing effective training materials; using logic and reasoning to identify the strengths and weaknesses of alternative solutions; multi-tasking; paying attention to details and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; researching and analyzing data from multiple sources; analyzing various financial, technical, and legal documents; customer service; resolving contentious situations; following written and oral directions and instructions; and word processing, spreadsheet, and database applications are required. The incumbent is required to develop feasible solutions considering available resources and organizational values. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of tax accounting and auditing standards, principles, and practices; taxation, tax jurisdiction, and their basis in law; financial analysis; research and analysis methods; budgeting; public administration and business management principles; customer service standards; operational and program planning; organizational development; quality assurance methods and techniques; revenue sources and market trends; state and federal tax laws, rules, and regulations; applicable administrative rules and departmental policies, rules, guidelines and procedures; organizational development and analysis; change management; tax examination, collection, and enforcement policies and procedures; and technical writing.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in public administration, business administration, communication, accounting, statistics, economics, finance, or directly related field and five years of job-related work experience.
 - Work experience should include progressively responsible experience in program planning, analysis, and policy development and work in federal and/or state income tax auditing.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.

- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Work hours may exceed 40 hours per week from time to time. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Gene Walborn, Division Administrator Date: December 2011

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: December 2011

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____